



# **FORKLIFT INITIATIVE**

## APPLICATION CHECKLIST

### **REQUIRED DOCUMENTATION** (This is the information that is necessary to complete the application process)

Note: For your use only – it is not necessary to return this page with the application.

- ☐ Completed and signed Forklift Initiative Grant Application (pp.1-3).  
(final application must have original signatures)
  - ☐ Forklift Initiative Assignment form (p. 5, if applicable).
  - ☐ Maintenance records or other proof of ownership and operating hours for the past two years.
  - ☐ Manufacturer's statement of origin or specification sheets for new and replaced equipment.
  - ☐ Copy of the purchase or financing agreement and/or invoice showing the price paid for the new equipment.  
**OR**
  - ☐ Copy of lease agreement (must be for a minimum of 5 years and extend to the end of activity life of the equipment under the grant)
- NOTE:** The customer must have equity in a downpayment or upfront lease buydown equal to the amount of the grant and this has to be shown on the installment agreement of lease agreement.
- ☐ Copy of scrap receipt indicating that both the old engine and the chassis have been rendered inoperable
  - ☐ Photo of destroyed old engine with serial number visible if possible. Photos should visibly show that the old forklift has been rendered inoperable.
  - ☐ Maintenance contract for the new equipment. Maintenance must be performed by a RRC certified technician if the customer is maintaining the new forklift. Verification of the certification will be necessary (provide a copy of the individual's certification card).
  - ☐ Proof of property insurance from customer that cover the new unit (Certificate of Insurance from carrier)

If approved by the Railroad Commission of Texas, these documents will constitute a binding contract for the applicant for the activity life of the equipment for which the grant is received.